



**Office of the Chief Financial Officer**

**Office of Tax & Revenue ∞ Office of the Chief Information Officer**

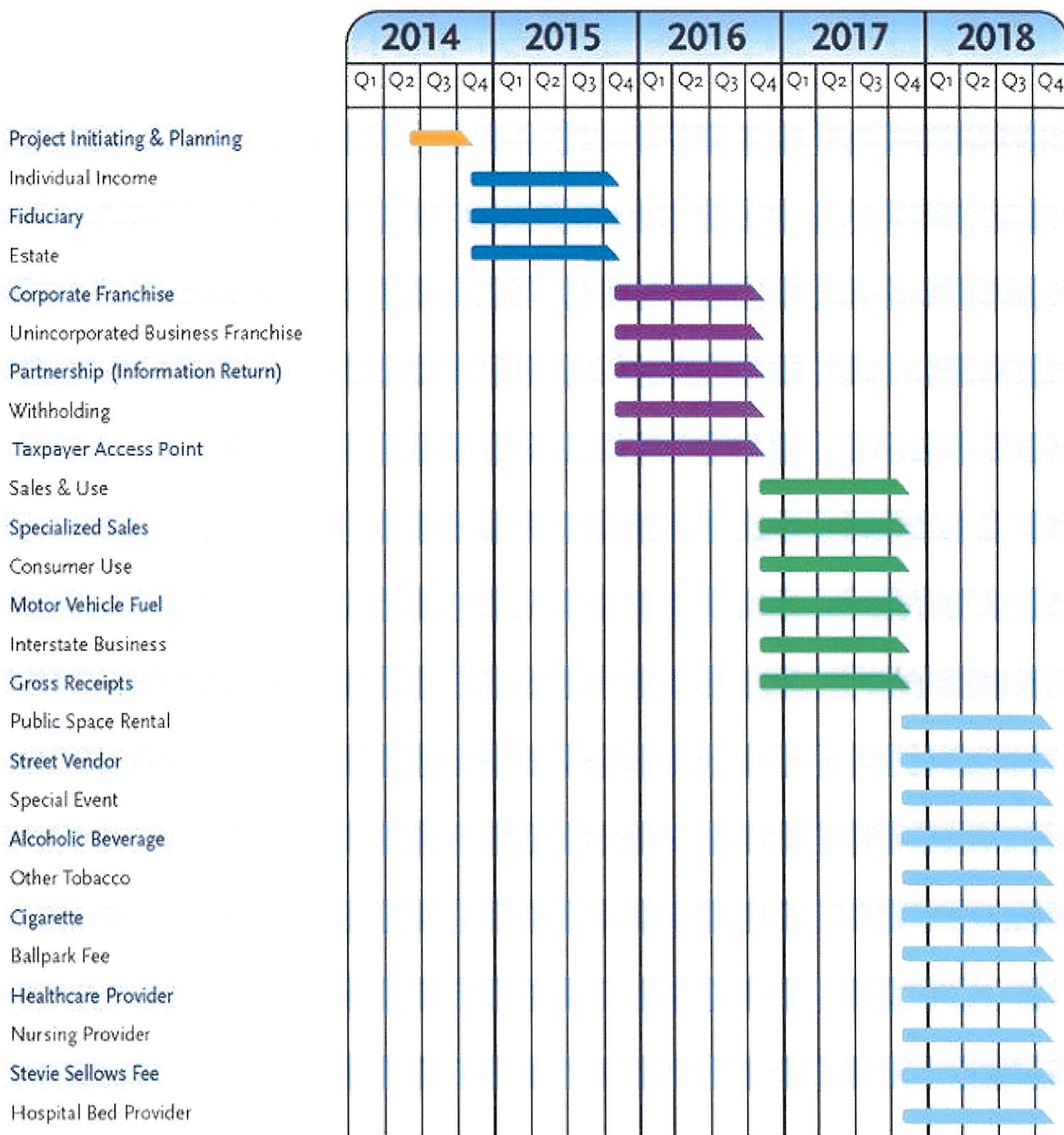
**FAST Enterprises**

**Implementation of a  
Modernized, Configurable, COTS Tax System  
For  
The Citizens of the District of Columbia**

## Modernized Integrated Tax System (MITS) Key Points

- In October, OTR implemented the first phase of the Modernized Integrated Taxes System (MITS) to improve customer service to taxpayers. This multi-year project included full implementation of Individual Income, Estate and Fiduciary taxes.
- The implementation timeline is 4 years from begin date in 4 phased rollouts beginning with individual income taxes. Franchise and withholding taxes are in phase 2, sales and use tax in phase 3. Several minor taxes are also included in phase 3 and all remaining taxes and fees are rolled out in phase 4
- The OCFO has committed staff resources to ensure success.
- Citizen benefits include:
  - Robust notice facility to provide notifications of changes to taxpayer accounts and other tax information not available in the current system
  - Transparency in account transactions
  - Better fraud detection to protect against identity theft and other tax crimes
  - Complete e-Commerce and self-help capabilities
  - Customer service will have real time information to be better able to handle inquiries
- OCFO benefits include:
  - Modernized system that will remain current and reliable for the foreseeable future
  - Accurate real time processing capabilities
  - Enhanced analytics used for processing such as scoring for fraud and collection purposes as well as audit selection, data warehouse matching and other discovery functionality and enhanced analytics for revenue analysis
  - Audits are worked within the system using standardized audit work papers which will roll the results up to the taxpayers' financial transactions automatically.
  - State of the art electronic processing capabilities reducing data processing costs
  - Configurable system allowing rapid reaction to changing tax laws and District Council initiatives
  - Enhanced data warehouse capabilities and data marts used for compliance programs
  - A COTS (Commercial Off The Shelf) system allowing easier application of new system releases. The system is both secure and auditable

## District of Columbia



## **TAP Web Requests and Services**

### Core web requests:

- New Login Activation
  - Additional Login Activation
  - Third Party Login Activation
- Recover username/password
- File Return (for each return type)
  - File Extension Request
- Amend Return
- Schedule ACH Debit Payment (user selects voucher type, period, settlement date)
- Add Name (customer or account)
  - Edit / Cease Name
- Add Address (customer or account)
  - Edit / Cease Address

### Core services:

- Where's my refund?
- View / print correspondence
- View / print prior return filings
- Manage bank account info for payments
- Secure messaging with agency

### Site-specific requests:

- New Business Registration
- Add / Edit Contact
- Add / Edit Responsible Parties
- Add / Edit Business Owners and Officers
- Payment Plan Request
- Request for Waiver
- Request to Close Account
- Power of Attorney

### Site-specific services:

- Bulk W2 upload
- 1099 electronic copy (TP needs to indicate to forego actual mailing)
- Estimated Payment lookup